

**2003 SCOTTISH VISITOR ATTRACTION BAROMETER  
June 2003 REPORT**

**Commissioned by VisitScotland**

**Conducted by the Moffat Centre for Travel and Tourism Business Development,  
Division of Management, Glasgow Caledonian University**



**1.0 INTRODUCTION**

The Visitor Attraction Barometer is a monthly review of attractions' performance data. Attraction visitation is considered by geographic location, sector and other key variables. It provides a regular monitor of performance, based on contacting 387 attractions. If you have any comments or suggestions on this report, please contact Norin Arshed (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: n.arshed@gcal.ac.uk).

**2.0 JUNE 2003/2002 AND JANUARY – JUNE 2003/2002**

**Summary**

This Barometer compares the period of June 2003 with June 2002. It is based on contacting 387 visitor attractions in Scotland. Some 355 attraction operators provided figures for the month of June 2003, a response rate of 92%. The visitor figures recorded can be compared with data collected in year 2002. No estimated figures have been used for this Barometer to give a more accurate analysis. Where there are less than 4 respondents in any section, no comparative % change will be noted because of low sample size (this is indicated by an asterix).

The following table shows total visits recorded for June 2003/2002 and Jan-June 2003/2002 as well as the % change calculation.

Attractions	Jun-03	Jun-02	% Change	Jan-Jun 2003	Jan-Jun 2002	% Change
355	2,127,422	2,206,841	-3.6	8,557,512	8,486,538	0.8

The total number of visits representing the 355 barometer attractions in Scotland for the period June 2003 was **2,127,422**. When compared to comparable data from the previous year of **2,206,841** visits, this shows a visits decrease of **-3.6%**. However, when the total visits figure for 2003 of **8,557,512** is compared with year 2002's total visits figure of **8,486,538**, performance for year 2003 shows an increase in visits of **0.8%**. A further breakdown is shown below, where the months of January-June 2003 can be compared with January-June 2002 with their % change calculations.

Attractions	Month	Visits	Month	Visits	% Change
355	Jan-03	732,477	Jan-02	700,922	4.5
	Feb-03	916,506	Feb-02	883,484	3.7
	Mar-03	1,092,420	Mar-02	1,242,296	-12.1
	Apr-03	1,849,644	Apr-02	1,636,417	13.0
	May-03	1,839,043	May-02	1,816,578	1.2
	Jun-03	2,127,422	Jun-02	2,206,841	-3.6

It should be noted that the Kelvingrove Art Gallery & Museum closed its doors on 29th June 2003. The Kelvingrove Art Gallery & Museum was one of the top free attractions in Scotland and the imminent closure of the attraction has impacted on reducing visitation figures in the Glasgow area and for the Museum and Art Gallery category.

The highest increase in visits recorded by ATB area in June were experienced in the Scottish Borders (12.4%), the Western Isles (12.2%) and the Shetland Islands (10.1%). Greater Glasgow showed the largest decrease in visits during the same period with a decline of -22.8%. Dumfries & Galloway saw a decline on visit figures (-7.1%) with a total of 5,416 less visitors in June 2003. During the month of June 2003 the highest increases in visits were recorded by Gardens (28.0%), 'Other' category (2.6%) and the Wildlife/ Zoo/ Safari Park/ Farm category (1.2%). The Museum and Art Gallery category saw a decline in visits of -13.4%, followed by Historic House category with -10.9% and the Industrial/Craft Category experiencing a decrease of -6.4%.

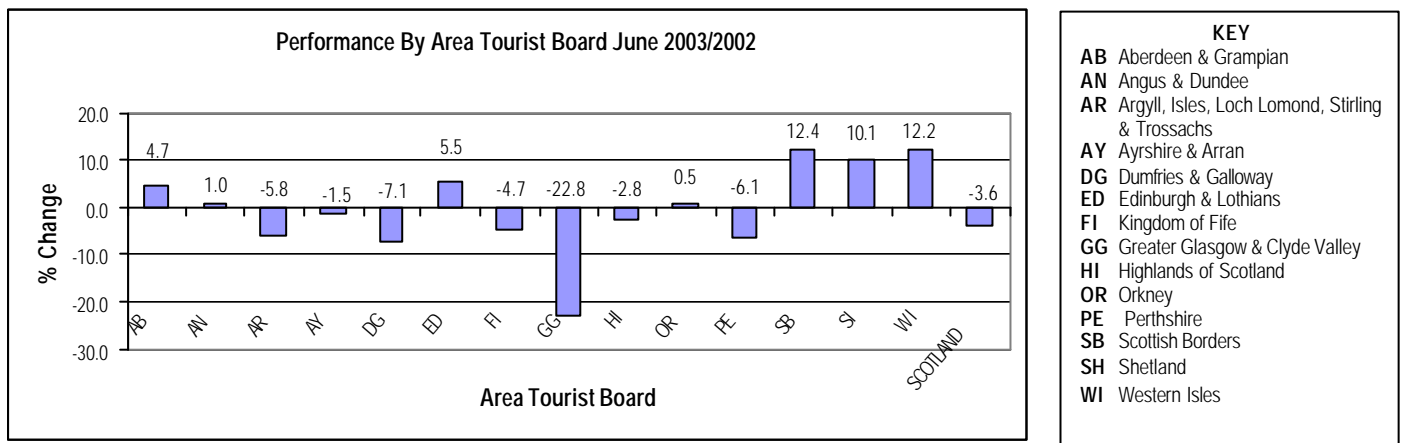
The greatest increases in visits were experienced by attractions located in Rural areas (1.6%) followed by Seaside areas (0.3%). The highest decrease in visits were in the Urban area where the visit figures declined by -9.8%. Attractions achieving volume of 1-19,999 visits experienced an increase of 17.2%. Both the Free and Paid admissions for the month of June experienced a decrease in visits, -4.2% and -3.1%, respectively. The highest increases in visits by LEC area were experienced by attractions in Argyll & The Islands (19.7%), Ross & Cromarty (14.9%) and the Borders (12.4%). Glasgow experienced the largest decrease in visits of -24.8%, followed by Lanarkshire decreased with -24.2% and Skye & Lochalsh with -23.4%.

**3.0 PERFORMANCE BY AREA TOURIST BOARD**

Performance by Area Tourist Board – June 2003/2002 and January-June 2003/2002

ATB Area	Jun-03	Jun-02	% Change	Jan-Jun 2003	Jan-Jun 2002	% Change
Aberdeen and Grampian (50)	219,562	209,662	4.7	758,747	749,498	1.2
Angus and City of Dundee (18)	69,351	68,665	1.0	329,573	304,801	8.1
ALLST (36)	266,872	283,215	-5.8	945,856	957,158	-1.2
Ayrshire and Arran (16)	124,228	126,073	-1.5	446,775	439,369	1.7
Dumfries and Galloway (33)	70,573	75,989	-7.1	256,257	228,270	12.3
Edinburgh and Lothian (37)	572,719	542,901	5.5	2,626,163	2,442,199	7.5
Kingdom of Fife (23)	70,003	73,418	-4.7	239,334	238,451	0.4
Greater Glasgow (37)	318,880	412,888	-22.8	1,728,746	1,941,025	-10.9
Highlands of Scotland (35)	190,272	195,659	-2.8	582,751	609,414	-4.4
Orkney (14)	62,077	61,750	0.5	119,326	113,562	5.1
Perthshire (13)	65,211	69,421	-6.1	183,352	185,168	-1.0
Scottish Borders (23)	64,993	57,820	12.4	260,507	206,619	26.1
Shetland Islands (12)	14,620	13,283	10.1	34,884	28,801	21.1
Western Isles (8)	18,061	16,097	12.2	45,241	42,203	7.2
<b>SCOTLAND (355)</b>	<b>2,127,422</b>	<b>2,206,841</b>	<b>-3.6</b>	<b>8,557,512</b>	<b>8,486,538</b>	<b>0.8</b>

Note: Number in brackets indicates the number of visitor attractions per ATB.

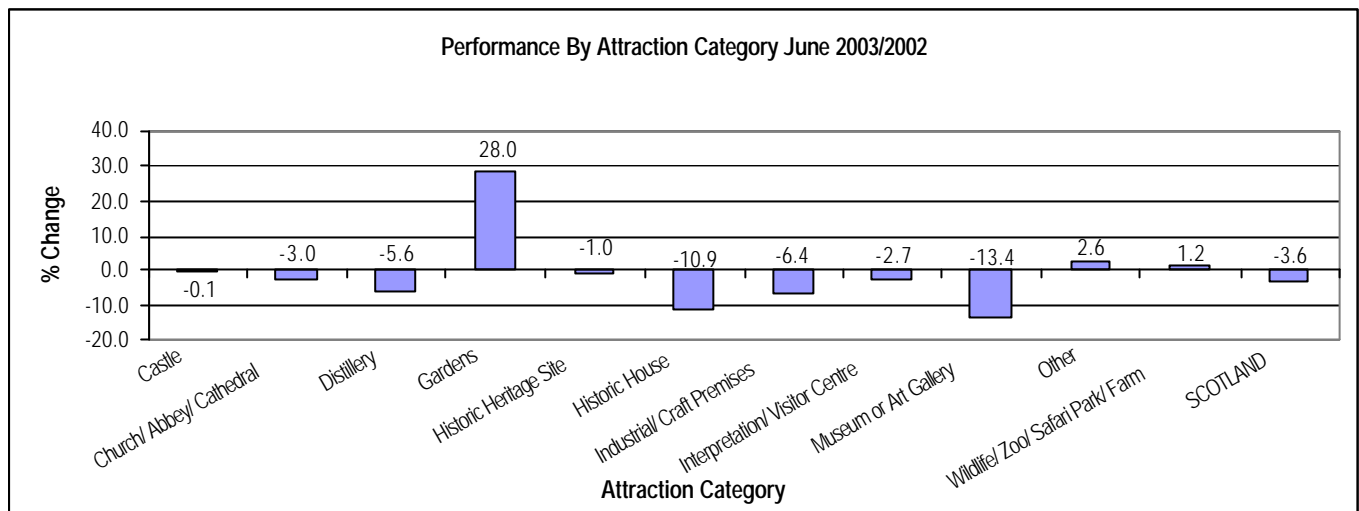


**4.0 PERFORMANCE BY ATTRACTION CATEGORY**

Performance by Attraction Category – June 2003/2002 and January-June 2003/2002

Attraction Category	Jun-03	Jun-02	% Change	Jan-Jun 2003	Jan-Jun 2002	% Change
Castle (52)	416,784	417,347	-0.1	1,198,999	1,211,177	-1.0
Church/ Abbey/ Cathedral (10)	32,656	33,678	-3.0	80,593	76,892	4.8
Distillery (10)	35,930	38,079	-5.6	92,545	90,976	1.7
Gardens (23)	176,076	137,542	28.0	683,308	606,705	12.6
Historic Heritage Site (20)	74,254	75,004	-1.0	155,872	160,155	-2.7
Historic House (30)	111,925	125,650	-10.9	399,296	372,204	7.3
Industrial/ Craft Premises (11)	40,850	43,658	-6.4	195,539	194,432	0.6
Interpretation/ Visitor Centre (57)	330,187	339,370	-2.7	1,200,556	1,129,352	6.3
Museum or Art Gallery (109)	607,826	701,828	-13.4	3,350,848	3,446,331	-2.8
Other (23)	198,072	193,068	2.6	783,410	806,116	-2.8
Wildlife/ Zoo/ Safari Park/ Farm (10)	102,862	101,617	1.2	416,546	392,198	6.2
<b>SCOTLAND (355)</b>	<b>2,127,422</b>	<b>2,206,841</b>	<b>-3.6</b>	<b>8,557,512</b>	<b>8,486,538</b>	<b>0.8</b>

Note: Number in brackets indicates the number of visitor attractions per category.



## 5.0 PERFORMANCE BY LOCATION

Performance by Location – June 2003/2002 and January-June 2003/2002

Location Category	Jun-03	Jun-02	% Change	Jan-Jun 2003	Jan-Jun 2002	% Change
City (56)	965,189	1,025,033	-5.8	4,774,922	4,769,709	0.1
Seaside (59)	171,871	171,349	0.3	486,447	467,856	4.0
Urban (86)	285,299	316,305	-9.8	1,104,779	1,113,475	-0.8
Rural (154)	705,063	694,154	1.6	2,191,364	2,135,498	2.6
<b>SCOTLAND (355)</b>	<b>2,127,422</b>	<b>2,206,841</b>	<b>-3.6</b>	<b>8,557,512</b>	<b>8,486,538</b>	<b>0.8</b>

Note: Number in brackets indicates the number of visitor attractions per location.

## 6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – June 2003/2002 and January-June 2003/2002

Range of Volume of Visits	Jun-03	Jun-02	% Change	Jan-Jun03	Jan-Jun02	% Change
1 - 19,999 (208)	297,043	253,375	17.2	800,876	728,376	10.0
20,000 - 49,999 (65)	297,206	294,085	1.1	977,963	899,907	8.7
50,000 + (82)	1,533,173	1,659,381	-7.6	6,778,673	6,858,255	-1.2
<b>SCOTLAND (355)</b>	<b>2,127,422</b>	<b>2,206,841</b>	<b>-3.6</b>	<b>8,557,512</b>	<b>8,486,538</b>	<b>0.8</b>

Note: Number in brackets indicates the number of attractions per range of volume of visits.

## 7.0 PERFORMANCE BY ADMISSION TYPE

Performance by Admission Type – June 2003/2002 and January-June 2003/2002

Type	Jun-03	Jun-02	% Change	Jan-Jun 2003	Jan-Jun 2002	% Change
Free (148)	956,485	998,694	-4.2	4,610,453	4,566,497	1.0
Paid (207)	1,170,937	1,208,147	-3.1	3,947,059	3,920,041	0.7
<b>SCOTLAND (355)</b>	<b>2,127,422</b>	<b>2,206,841</b>	<b>-3.6</b>	<b>8,557,512</b>	<b>8,486,538</b>	<b>0.8</b>

Note: Number in brackets indicates the number of visitor attractions per admission type.

**7.0 PERFORMANCE BY LOCAL ENTERPRISE COMPANY (LEC) AREA****Performance by LEC Area – June 2003/2002 and January-June 2003/2002**

LEC Area	Jun-03	Jun-02	% Change	Jan-Jun 2003	Jan-Jun 2002	% Change
Argyll & The Islands (16)	75,556	63,119	19.7	218,289	191,226	14.2
Ayrshire (15)	118,921	121,396	-2.0	429,882	425,897	0.9
Borders (23)	64,993	57,820	12.4	260,507	206,619	26.1
Caithness & Sutherland (7)	13,791	12,405	11.2	27,850	25,355	9.8
Dumfries & Galloway (33)	70,573	75,989	-7.1	256,257	228,270	12.3
Dunbartonshire (3) *	32,490	35,327		130,385	149,894	
Edinburgh & Lothian (37)	572,719	542,901	5.5	2,626,163	2,442,199	7.5
Fife (23)	70,003	73,418	-4.7	239,334	238,451	0.4
Forth Valley (19)	191,354	214,880	-10.9	726,720	752,613	-3.4
Glasgow (19)	251,005	333,958	-24.8	1,455,055	1,646,270	-11.6
Grampian (35)	164,262	150,493	9.1	544,246	528,029	3.1
Inverness & Nairn (8)	95,497	101,697	-6.1	280,169	359,225	-22.0
Lanarkshire (10)	26,761	35,319	-24.2	111,844	117,385	-4.7
Lochaber (7)	35,316	37,949	-6.9	127,445	102,538	24.3
Moray, Badenoch & Strathspey (17)	72,215	79,446	-9.1	285,825	289,371	-1.2
Orkney (14)	62,077	61,750	0.5	119,326	113,562	5.1
Renfrewshire (7)	14,026	14,882	-5.8	49,150	45,143	8.9
Ross & Cromarty (6)	21,378	18,606	14.9	51,808	38,731	33.8
Shetland (12)	14,620	13,283	10.1	34,884	28,801	21.1
Skye & Lochalsh (4)	3,621	4,725	-23.4	13,534	15,663	-13.6
Tayside (32)	138,183	141,381	-2.3	523,598	499,093	4.9
Western Isles (8)	18,061	16,097	12.2	45,241	42,203	7.2
<b>SCOTLAND (355)</b>	<b>2,127,422</b>	<b>2,206,841</b>	<b>-3.6</b>	<b>8,557,512</b>	<b>8,486,538</b>	<b>0.8</b>

Note: Number in brackets indicates the number of visitor attractions per LEC Area.

**9.0 COMMENTS**

The following quotes have been drawn from comments made by operators to help epitomise the reasons that have impacted on visitation performance during the period June 2003.

**Reasons for positive impacts on visitor figures:-**

*Held a major event!*

*Last year did not open until 25th June, this year opened in May.*

*The only explanation we can find is that apart from the much nicer weather this year.*

**Reasons for negative impacts in visitor figures:-**

*I was quite disappointed with the figures when I first saw them. I asked our General Manager, she put it down to the good weather. When it is wet or windy we get our best numbers.*

*Closed for refurbishment.*

*School group numbers were well up on last year, although general visitor numbers were slightly down.*

*Decrease due to less Americans.*

*The decrease is due to workshops being held last year amongst more popular exhibitions than this year.*

*The figures are down on the same month last year, although the average spend per head has increased.*